

Quicken for Mac Conversion Instructions

Quicken for Mac 2006-2007

Web Connect

Table of Contents

TABLE OF CONTENTS 1

INTRODUCTION..... 2

DOCUMENTATION AND PROCEDURES..... 2

 Task 1: Conversion Preparation.....2

 Task 2: Connect to [Financial Institution A]2

 Task 3: Deactivate Your Account(s) At [Financial Institution A]2

 Task 4: Re-activate Your Account(s) at [Financial Institution B]3



Introduction

As **Northern Skies FCU** completes its system conversion the **NEW eNavigator Online Banking platform**, you will need to modify your Quicken settings to ensure the smooth transition of your data. To complete these instructions, you will need your **[User ID and Password]** for the **Northern Skies FCU** and **the NEW eNavigator Online Banking** websites.

It is important that you perform the following instructions exactly as described and in the order presented. If you do not, your service may stop functioning properly. This conversion should take 15–30 minutes.

NOTE: This update is time sensitive and can be completed on or after **May 19, 2015**

Documentation and Procedures

Task 1: Conversion Preparation

1. Backup your data file. For instructions to back up your data file, choose **Help** menu > **Search**. Search for **Backing Up**, select "**Backing Up Your Data**," and follow the instructions.
2. Download the latest Quicken Update. For instructions to download an update, choose **Help** menu > **Search**. Search for **Updates**, select "**Checking for Updates to Quicken**," and follow the instructions.

Task 2: Connect to Northern Skies FCU

1. Choose **Online** menu > **Download Transactions**.
2. Select your account from the drop-down list.
3. Click **Download** to access **Northern Skies FCU** website at www.northernskiesfcu.org.
4. Enter your **Customer ID** and **PIN** to login to the **Northern Skies FCU** web site. Download your transactions through **May 19, 2015** into Quicken.
5. Repeat the download process for each account you have at **Northern Skies FCU** (such as checking, savings, credit cards and brokerage).
6. Once all accounts have been downloaded, accept all transactions into your Quicken account registers.

Task 3: Deactivate Your Account(s) At Northern Skies FCU

1. Choose **Lists** menu > **Accounts**.

2. Select the account that you want to disable and click **Edit**.
3. In the **Download Transactions** drop-down list, select **Not Enabled**. Follow the prompts to confirm the deactivation.
4. Remove the information within the **Account Number** and **Routing Number** fields.
5. Click **OK** to save your edits.
6. Repeat steps 2 – 5 for each account at **Northern Skies FCU**
7. Verify that your account list does not display a blue online circle icon for any accounts at **Northern Skies FCU**.

Task 4: Re-activate Your Account(s) at Northern Skies FCU (NEW Banking)

1. Log into the **Northern Skies FCU (NEW Banking)** website at www.northernskiesfcu.org.
2. Download and import your transactions to Quicken.
3. Click the **Use an existing account** radio button.
4. Select the corresponding existing Quicken account in the drop-down list and click **OK**.
5. Repeat steps 3-4 for all accounts at **Northern Skies FCU**.
6. Choose **Lists** menu > Accounts. Verify that each account at **Northern Skies FCU** has a blue online circle indicating that it has been reactivated for online services.

Thank you for making these important changes!